

Area #1: Professional Development

Purpose: PCBR provides educational opportunities to its members to elevate their professionalism.

Strategic Objective: PCBR provides exceptional curriculum for professional development.

Strategies:

1. PCBR provides new and continuing member code of ethics training.
2. PCBR offers NAR designation courses, advanced skill classes, technology and business training, and new member orientation.
3. PCBR to provide highest quality of instructors.
 - A. Classes are offered on a free or fee-basis, based on member demand identified through annual survey and member feedback.

Strategic Objective: PCBR provides community and industry specific speakers at events

Strategic Objective: PCBR provides an interactive website to enhance member access to professional development information.*

- A. Evaluates ease of use of the Professional Development department

Area #2: Communications

Purpose: PCBR communicates the value of a Realtor & accurate industry information to its members (internally) & the public (externally)

Strategic Objective: Through various communication venues, PCBR communicates relevant, timely & accurate industry (& governmental affairs information) to its members

Strategies:

1. Advocacy (evangelizing RPAC) communications to the members the value of participating in RPAC fund raising.*
2. Code of Ethics *
 - A. Communicate to our new & existing members that we are running training classes.
 - B. Communicating that the State association is the clearing house for grievances, mediation, arbitration & member services.
3. Communicate to our membership that PCBR is fiscally responsible & financially solvent (via audit/accounting review report)*
4. Promote to our members the importance of participating in any NAR conducted efforts (surveys) to assess member understanding of the overall value provided by associations at all 3 levels of the Realtor Organization

Strategic Objective: PCBR informs the public with accurate, reliable & valuable real estate industry information and reinforces the importance of hiring a Realtor for their Real Estate transactions.

Strategies:

1. Consumer outreach
 - A. Promote market stats, real estate trends & issues.
 - B. Promoting value proposition of using a Realtor and engaging in community activities which enhance the image of the Realtor.
 - C. Advocacy Efforts- Informing & Engaging the public in legislative/political issues that impact real estate & related issues.
 - D. Community Investment- Informing the public of our efforts in human resources and fund raising for the benefit of charitable/community organizations.

Strategic Objective: PCBR utilizes effective mechanisms to convey overall market conditions & the advantages of using a Realtor. (at least quarterly)

Strategies:

1. Technology*
2. Interactive website: email blasts to members promoting member programs, products & services*
3. Member access to professional standards. *
4. Publish strategic plan on website. *

Area #3: Governance

Purpose: PCBR ensures legal compliance, fiscal responsibility & efficient operation of the organization.

Strategic Objective: Have a set of Bylaw that are approved by NAR & policies approved by PCBR BOD.

- A. Evaluated current Bylaws vs NAR model Bylaws.

Strategic Objective: CEO oversees operations, systems, facilities, consultants & staff.*

Strategies:

1. No individual on the BOD has access to the consultants without CEO & BOD authorization.

Strategic Objective: PCBR DOB invest in the professional development of the CEO and staff.

- A. CEO attends AEI
- B. CEO completes a minimum of six hours of Realtors Association professional development annually as required by NAR*

Strategic Objective: PCBR provides leadership development for its CEO, BOD & committee chairs and staff.*

- A. CEO communicates state & national opportunities for education.
- B. President-Elect or other designee, attends UAR Leadership Academy.
- C. NAR annual & NAR Leadership & mid year attendance for CEO, president, president-elect, MLS director and up to 2 more as budget allows.
- D. UAR annual Convention attendance for CEO, president, president-elect.
- E. Evaluate & support candidates for positions at the state level.
- F. Provide a member slate of quality candidates for all UAR committees.
- G. Cultivate qualified candidates for consideration for the Utah Real Estate Commission.

Strategic Objective: PCBR follows best practices for fiscal responsibility & adopts policies that ensure the fiscal integrity of our financial operations.

Strategies:

1. Annually evaluate fiscal metrics, management, consultants & business plan.
 - A. Annually review the Strategic Plan
 - B. Annual budget
 - C. Annual CPA review and periodic audits
 - D. Set up a task force for non-dues revenue & conduct an analysis of the MLS revenue vs MLS dues
 - E. Evaluates CEO annually

Strategic Objective: PCBR has a finance committee that has specific responsibilities to the BOD

1. A monthly basis the finance committee verifies expenses, ensures reconciliation & monitors the projected budget & makes a recommendation to the BOD to approve the financial statement
2. Monitors investment policy as recommended by the financial consultants
3. Formulate budget & make recommendation to the BOD
4. Implement financial policy approved by the BOD
5. Task force to set forth criteria for members of the Finance Committee

Strategic Objective: PCBR continually evaluates opportunities for additional non-dues revenue income streams

Strategies:

1. Evaluate current programs that other boards have incorporated.
(Realtor.org & AE side of Realtor.org)

Strategic Objective: PCBR is open to opportunities for members and/or acquisitions that will foster an environment for economies of scale and increased benefits/services for members.

Strategic Objectives: PCBR regularly recognizes members that participate, volunteer, accomplish designations, etc...

Area #4: Community Relations

Purpose: By volunteering, donating and participating in local non-profit and community service organizations, PCBR demonstrates the positive role of REALTOR®s as an integral part of our community.

Strategic Objective: We maintain a database of member participation in community and non-profit organizations.

Strategies:

1. Reach out to members twice each year to update database of member involvement.
2. Publish results to various media outlets.

Strategic Objective: PCBR invests in our community.*

1. Organize human resources and fundraise for community and charity organizations.*
2. Engage public in legislative/political issues that impact real estate and related issues.*
3. Make direct contributions to community organizations through our Philanthropic Foundation.
 - A. Fundraising through the Board and financial allocations by the Board are contingent upon the foundation satisfying the approved criteria.

Area #5: Government Affairs

Purpose: PCBR is a proactive and influential voice in local government to protect, preserve and promote property rights and the professional interests of our industry.

Strategic Objective: Promote political positions, platforms and policies to achieve the goals of our position statement.

Strategies:

1. Participate in Calls to Actions through REALTOR® Action Center and provide adequate proof of participation.
 - A. Utilize email member communication.
2. Participate in state Calls for Action & provide proof of participation.
 - A. Utilize email member communication.
3. Demonstrate local advocacy engagement.
 - A. Utilize email member communication.

Strategic Objective: Promote the value of investing in and the benefits received from the support of RPAC. (Raise funds to support RPAC)

Strategies:

1. Include voluntary RPAC contributions “above the line” in dues billing.
 - A. PCBR to include on member billing.
 - B. RPAC fundraisers.
 - C. RPAC member support recognition.

Strategic Objective: Maintain a list of members with connections to elected officials and/or appointed officials.

- A. Incorporate into member survey.
- B. RPAC/legislative committee to initiate list.

Strategic Objective: Financially & politically support candidates who champion our professional interests.

Strategies:

1. Engage the public in legislative/political issues that impact real estate & related issues.
 - A. Legislative Committee to coordinate with UAR
 - B. Utilize member email communication to communicate issues to members
 - C. Social Committee to organize legislative forums.

Strategic Objective: Cultivate relationships with industry and non-industry organizations.

Strategies:

1. Promote the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®.
 - A. Work with other organizations to promote private property rights and home ownership.

- B. Identify groups we should cultivate relationships with. (lenders, home inspectors, builder associations)
- C. Identify elected officials we want to cultivate relationships with

Area #6: MLS

Purpose: PCBR has an income producing MLS that provides subsidies to the PCBR budget and provides “state of the art” services for its participants.

*Aligns with NAR Core Standards